

Oracle Enterprise Planning & Budgeting Cloud Service Fundamentals

Course Description

Course Name: Oracle Enterprise Planning and Budgeting Cloud Service Fundamentals
Course Number: O-EPBCS-FUN
Duration: 5 Days

This class begins with an orientation to the EPBCS environment and provides a brief overview of the Financials, Workforce, Projects and Capex business processes that make up its framework. We then review the built-in functionality, configuration wizards, and Oracle Planning leading practice concepts such as incremental enablement, upgradable while maintaining configurability, and user empowerment.

More granularly, the class then covers how to set up and configure the EPBCS environment, create and configure your base financials workflow metadata, and set up basic member formulas. We then address how to set up security, create forms, set up and manage the approval process, and load and analyze data. Students will engage in a series of hand-on exercises to solidify concepts throughout each section so they will be prepared to implement their application.

The class then focuses on Smart View, Financial Reporting Studio and Reporting Web Studio. Students will build ad hoc reports, work further with data forms, and learn how to enter data and manage metadata using Smart View.

The course format consists of lecture plus hands-on exercises and workshops within the Cloud Service.

Who Should Attend

- Report Developers
- Power Users
- Application Developers

Prerequisites

- Basic Microsoft Windows skills
- Knowledge of spreadsheets
- Knowledge of Hyperion Applications

Course Information

Advance Preparation: None
Program Level: Intermediate
Delivery Method: Group – Live
CPE Credit: 40 credits in Specialized Knowledge and Applications

Course Registration

compintelligence.com/oracle-hyperion-training
or 203-941-0714
Policies: For information regarding cancellations, refunds, or other questions, contact us training@compintelligence.com



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Oracle Enterprise Planning & Budgeting Cloud Service Fundamentals

1 Oracle Enterprise Planning and Budgeting Cloud Services

Overview of EPBCS

Oracle Enterprise Planning and Budgeting Cloud Service (EPBCS)

EPBCS Features

Planning Applications

Planning and Essbase

Aggregate Storage Option (ASO) and Blocked Storage Option (BSO) Databases

Properties of Dimensions

2 Navigation – Simplified Interface

Navigation – Simplified Interface

Log on the Application

Navigate the Home Page

Create an Announcement

Delete an Announcement

Access the Navigator Page

Set Preferences

Log out of the Application

3 Create and Manage the Application

Create and Manage the Application

Create an Application

Application Types

Define Setup Options for the Application

Remove the Application

Schedule Maintenance

Navigate the Inbox/Outbox Explorer

Launch the Application Monitor

4 Metadata Management

Manage Metadata

Create and Maintain Common Dimensions

Create Hierarchies in Dimensions

Add Custom User-Defined Dimensions

Other Common Dimensions

Entity (Department)

Other User-Defined Dimensions

Member Formulas and Other Properties

Alias Tables

Smart Lists

User Defined Attributes (UDAs)

Load Dimension Metadata

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- Refresh the Application
- Refresh the Application Database
- Manage Jobs

5 Create and Use Forms

- Create and Use Forms
 - Forms and Folders Overview
 - Create Simple Forms
 - Create Composite Forms
 - Form Access
 - Create Menus
 - Create Formula Rows and Columns
 - Build Validation Rules
 - Custom Messaging
 - Set Up Form Properties
 - Data Entry Tasks
 - Use Smart Lists
 - Spread Data
 - Calculate Data in Forms
 - Perform Ad Hoc Actions in Forms

6 Manage Business Rules

- Manage Business Rules
 - Apply Business Rules to a Form
 - Change the Display Order of Business Rules on a Form
 - Define Properties of a Business Rules
 - Assign, Edit or Remove Access to a Business Rule

7 Create and Use Task Lists

- Create and Use Task Lists
 - Task Lists Overview
 - Usage of Tasks Lists
 - Create Task Lists
 - Manage Task Lists
 - Add Tasks to a Task Lists
 - Clear Task Lists
 - Assign Access to Task Lists
 - Remove Access to a Task Lists
 - Print Task List Reports

8 Smart View

- Smart View
 - Smart View Installation Components
 - Smart View Overview
 - Typical Business Process for Smart View
 - Smart View Interface
 - Ribbon

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Smart View Options

- Global Options and Sheet Level Options

- Member Options

- Data Options

- Advanced Options

- Formatting Options

- Cell Styles

 - Use Smart View Formatting

 - Use Excel Formatting

- Smart View Panel

- Connections

 - Shared Connections and Private Connections

 - Connect to Data Sources

 - Disconnect from Data Sources

 - Create Private Connections

- Format Ad Hoc Grids

 - Zoom In

 - Zoom in to the Default Level

 - Zoom in to a Selected Level

- Zoom Out

- Set a Default Zoom Level

- Enable Double-Click Zooming

- Pivot

- Remove Selected Members from the Grid

- Insert Rows and Columns

- Set Dimensions and Members

- Select Members from the Member Selector

- Display POV Toolbar in Smart View

- Place Members on the Grid with POV Toolbar

- Cell-Based POV for EPM Cloud

- Planning Admin Extension

9 Security

- Add a User

- Modify or Remove a User

- Security

 - Create a Group

 - Edit a Group

 - Delete a Group

10 Manage the Approval Process

- Manage the Approval Process

- Approval Process Overview

- Planning Unit Hierarchies

- Impact of Entity Hierarchy on the Review Process

- Budgeting Processes Types

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- Create Planning Unit Hierarchies
- Assign Approval Unit Hierarchy
- Manage Approvals
- Copy Versions
- Copy Data
- Clear Cell Details

11 Dashboards

Overview of Dashboards

- Create a Dashboard

- View Dashboards

Create Dashboards

- Design Palette
- Dashboard Settings
- Add a Form to a Dashboard
- Add a Chart to a Dashboard
- Add a Form and a Chart to a Dashboard
- Launch Runtime
- Add Commentary to a Dashboard
- Add a URL to a Dashboard
- Delete a Dashboard
- Perform a Copy As for a Dashboard
- Assign Permission to a Dashboard
- Remove Permission to a Dashboard

Global and Local POV

12 Financial Reporting Studio

Financial Reports

- Download the Financial Reporting Studio Software

- Create a Report

- Opening a Financial Report

- Setting Preferences for Financial Reporting View

- Assign Security to a Financial Report

13 Financial Reporting – Web Studio

Overview

- Access the Financial Reporting Web Studio

Create Basic Reports

Report Objects Overview

- Report Object Toolbar Buttons
- Create Text Boxes
- Add Images
- Save Report Objects
- Insert Saved Report Objects
- Remove a Report Objects
- Design Headers and Footers
- Use Text Functions

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- Create Grids
- Select Members for Rows and Columns
- Set the Point of View
- Create Charts from an Existing Grid
 - Insert a Chart
- Define Chart Data
- Define Chart Titles, Legends, Axes, Element Style and Bar Options
- Position a Chart

14 Data Management – Set Up

- Data Management
- Overview
- Import Formats
 - Import Format Mappings
 - Fields for Fixed Import Groups
 - Import Format Builder
 - Fields for Delimited Import Groups
 - Import Expressions
- Locations
- Period Mapping
 - Global Mapping
 - Application Mapping
 - Source Mapping
- Category Mapping
 - Global Mapping
 - Application Mapping

15 Maps

- Maps
- Overview
 - Map Types
 - Processing Order
 - Edit Mapping Tables
 - Export/Import Maps

16 Data Load Rules

- Data Load Rules
- Overview
 - File-Based Data Load Rules
 - Run Data Load Rules
 - Check Data Load Rule Status
 - View Imported Data
 - Schedule Data Load Rules

17 Workforce Planning**

- Enterprise Workforce Planning
 - Overview of Enterprise Workforce Planning
 - Predefined Dimensions

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Predefined Artifacts

Compare Design Differences between Financial Planning Cubes and Workforce Planning Cubes

Integration Between Enterprise Workforce Budgeting, P&L Budgeting, and Reporting

Plan Types Available in the Enterprise Workforce Planning Application

18 Capital Expenditure Planning**

Developing an Asset

Putting an Asset in Service

Handling Existing Asset Information

Cash Flow of Asset Decisions

On-going Asset Costs

Maintenance

Insurance

Project Ranking

Decision Packages

CIP

Integration to the Approval Process

19 Project Planning**

Asset Integration

Define Capitalized Labor

Define Non-capitalized Labor

Allocating Employee Dollars

CIP

Project Ranking

Working with Decision Packages

***This functionality is contained in separate application workflows to be launched in conjunction with, (Workforce), or in addition to, (CapEx and Project Planning), setting up and running the Financials workflow within EPBCS. Course development is underway and detailed outlines and duration will be available just prior to when the courses become available for delivery.*